

Coupa Reimbursement Instructions

The MEDC partners with OpTech as a third-party payment vendor to manage reimbursements for all participating STEAM Ahead employers. To accomplish this, OpTech utilizes a Coupa Supplier Portal. This training manual provides information on how to create invoices in the Coupa Portal and view submitted, approved invoices and grant balances. Please see the Employer Handbook for information on STEAM Ahead and the payment schedule. Invoices should be submitted per the MEDC payment schedule (see Employer Handbook) to ensure prompt payment of funds.

This document will cover the following processes:

- PART I COUPA REGISTRATION (pgs. 1 6)
- PART II REIMBURSEMENT REQUEST (pgs. 7 11)
- PART III VIEW REMAINING GRANT FUNDING IN COUPA PORTAL (pgs. 12 13)

Questions?

- For program/policy-related questions, please contact MEDC at steamahead@michigan.org.
- For inquiries regarding invoices, the Coupa Portal, or payments, please contact OpTech at steamahead.pay@optechus.com.

PART I - COUPA REGISTRATION

All employers who have had interns **approved** for STEAM Ahead will receive an e-mail from the Coupa Supplier Portal. These e-mails will be sent on the Monday **after** you have received your intern approval notice from the MEDC and will be sent on behalf of OpTech, who manages the supplier portal. The subject line will be "Action Required – OpTech US Registration Instructions."

Please note, this e-mail contains a link that is only good for **48 hours**. If the link should happen to expire prior to you getting a chance to open it, please contact the OpTech STEAM Ahead e-mail address (steamahead.pay@optechus.com).

You only need to register in Coupa once. If you have already registered, please jump to Part II.

1) Open the e-mail and click on the button that reads "Join Coupa Supplier Portal".

Action Required - OpTech US Registration Instructions					
Coupa Supplier Portal <do_not_reply@supplier.coupahost.com></do_not_reply@supplier.coupahost.com>	C Reply	≪) Reply All	-> Forward	15	•••
To OMEDC SteamAhead			Tue 5	6/2024 2	29 P
 This sender de_net_repty@supplier.coupahost.com is from outside your organization. 					
(i) If there are problems with how this message is displayed, click here to view it in a web browset. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.					
Action Required - OpTech US Registration Instructions					
				_	i.
			Pow	rred by I	1
Hello Supplier,					
We handle all business spend electronically to make sure yeu're paid on time and prevent lost documents.					
To ensure your ability to do business with us, you have 48 hours to register your account. Please contact us of surgitar@count con if you are unable to register for any masceri					
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Janet Wagner OpTech US					
Join Coupa Supplier Portal Forwa villation					
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Business Spend Management					

- On the web page that pops up, fill in the fields, then click "Create an Account".
 - a. Please note, if you already have an account, you can click the "log in" option instead.
 - b. You are not required to enter a tax ID if you do not have one / do not wish to provide one. To skip this step, click the "do not have a Tax ID" box.

and easy setup of you you're ready to do but	ir accol siness t	unt with OpTech US so ogether.	
STEAMAHEAD			
Your legal business name (or le	gai persor	al name if an individual)	
* Email			
steomoheod@michigon.o	×0		
• First Name		* Last Name	
Mickey		Mouse	
* Password		* Confirm Password	
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Country/Region	icijada a nu	• Tax ID (])	
United States	~	*********	
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 You will receive a one-time verification code through your e-mail, which you will then type in when prompted.

Ve sent a	one time veri	fication co	de to steam	nahead@mic	higan.org	
Didn't receive	the Verification	Code? Re	equest a New	Code		
			Next			

- If you have a previous account, you will be prompted to select if you wish to continue to create a new account.
 - a. If you wish to join up with a previous account, select that option and follow steps.

 Join an Existing Account?

 Provide any of the additional info to get better suggestions.

 View existing accounts matching email domain michigan.org

 Business Name

 State

 State

 Outrry/Region

 Address Line 1

 City

 State

 DUNS Number

 Image: Not continue creating a new account

- 5) Continue filling in the relevant fields.
 - a. When entering your work phone #, be sure to use a cell phone and not a landline, because your multifactor authentication will be tied to this phone #.
 - b. Click "NEXT" once all fields are complete.

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6) Complete all fields and click "NEXT", or you can click "Skip for now" and fill this information in later.

- up for "Coupa Verified" this is not required. You can simply click "Continue" under the "Registered" column to access the Coupa Supplier portal without accruing any charges or fees.
- 8) Once logged in, click on the link for "SET UP".
- 7) You may receive a prompt asking you to sign
 - Coupa supplier portal

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tisk & Compliance

Oplech Make Sure You Get Paid

9) Click "Legal Entity Setup".

10) Click "Enable Multifactor Authentication".

11) Have the Multi Factor Authentication App ready on your phone (Microsoft Authenticator app recommended; other authenticators might not work).







STEAMAHEAD

Last Upo Cop

- a. Select "Add" or "+" to scan the QR code to attach the authenticator to this account.
- b. Once the accounts are linked, enter the
 6-digit verification code provided on
 your device.
- c. Click "Enable".
- d. You will see a pop-up screen that provides you with a list of security codes to recover your account. You have the option to download, copy, or print them, if desired, but it is not required.
- 12) Select "Via Text Message" as the default.
- 13) Enter the multifactor authentication code, then click "OK".
- 14) Enter your phone number again, click the CAPTCHA box, then enter the 6-digit verification code sent to your phone, and click "Enable".
 - After you do this, it may provide another pop-up of security codes you can either print or download, but this is not required.
- 15) On the menu, return to "Setup."
- 16) Click "Legal Entity Setup" on the Admin Menu, then select "Add Legal Entity".













17) Enter company's legal name and the country/region, then click "Continue".

Whe	ere's your business located	*	
Setting up your business details in C requirements. For best results with o possible.	coupa will help you meet your custor surrent and future customers, compl	mer's involcing and payment ete as much information as	1de
* Legal Entity Name * Country/Region	I	This is the official name of your business that is registered with the local government and the country/region where it is located.	
		Cancel Continue	to

- 18) Complete all required fields. Confirm that under the section reading "Which customers do you want to see this?" that OpTech is selected.
 - a. If you do not have a tax ID, select the "I don't have a Tax ID Number" box.
 Note: The Tax ID is not needed as you will not be receiving a 1099.

Which customers	do you want to see this?		
Do Io	ch US		
What address do	you invoice from?		
*Address Line 1	123 Fake St.	٥	
* City	Lansing		REQUIRED FOR
State	Select an Option	*	INVOICING
* Postal Code	49023		your legal onthy. This is the same
Country/Region	United States		location where you receive
	😰 Use this address for Remit-To 🕖	₽.	government documents.
	🛛 Use this for Ship From address 🕖		
What is your Tax	D? 🚺		
Country/Region	United States	××	
Tax ID			
	Children have been been		

ierportal		MICKEY - NOTIFICA
W	ere do you want to receive	payment?
	0 8 3 9	
* Payment Type Address	u l	*
What is your Remit-To Add	ess?	
Address Line 1	23 Fake St.	
City	ansing	
Postal Code	8886	
Country/Region	nited States	
		95
		Cance Save & Continue

20) Confirm Remit To Address is accurate. If yes, click "Next".

19) Verify the address is correct, and then click

"Save & Continue".



21) If it asks you about where to ship goods from, click"Done" because we are not shipping anything.

polier portal		MICKEY - NOTIFI	CATIONS
	Where do you ship goods from?		×
For many countries/region your legal entity is register	a including different shipping details on the invoice is required if they are different to where ed.	Add Ship From	
Title	Status		Laid
123 Fake St. Lansing 48888 United States	Active	Manage	
	Deactivate Legal	IE y Done	

Setup Complete

22) Click "Done" when the Set Up Complete window pops up.



You will now be registered in Coupa and able to submit reimbursements. This is a one-time process, meaning you will not have to repeat it. If you have any difficulties registering your employer account in Coupa, please contact OpTech at steamahead.pay@optechus.com.

PART II - REIMBURSEMENT REQUEST PROCESS

Prior to the start of the intern(s) reimbursement period, OpTech will enter all approved interns in Coupa. This will include:

- The intern's first and last name
- Their total number of approved hours per semester
- Their total number of approved reimbursements per semester

As interns are registered by OpTech, Coupa will automatically generate a PO, which it will send to employers. *There is nothing to do with this PO*. It is only to show your total reimbursement value available to you for that intern, for that semester.

Employers are asked to be mindful of the payment schedule, which is located in the <u>Employer</u> Handbook.

Additionally, only the primary and secondary payroll contacts listed on the Intern Submission Form will be registered in Coupa and will also be the only ones to receive communications regarding payment / reimbursement.

1) Log into Coupa



On the Coupa Portal home page, click
 "Orders" on the menu bar.

Contes viness Putte Setue Service	Sheets ASN Sourcing For	stasts Catalogs Add-ons More.,
Verify Your Account And Get Noticed Coupa Verified builds trust and gets you in fro cuttomers looking for products like yours.	nt of more Get	ierified
ME MEDC Secondar Printe Least Secondary of 1 Weet Medical		
Recent Activity	v 0	Announcements
Crear #5	Sec. 1	How do I appear in search?
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00/Nex L15 + 500.0 + L50 + 160 Nexes Investe # W2025 1 Op/Nex L55 + 720.0 + 1/50 + Nex paint	(Approval) in 17	
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 Click on either the PO Number or click the Gold Poker Chips (both will work).

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- 4) The Purchase Order screen is displayed and the purchase order line for each intern is.
 - a. The name of the intern, the total quantity of hours the intern may work based on the price, the hourly price for reimbursement, and the total of the grant contribution is displayed.

Note: If there is a PO line missing for an intern or the total amount for the intern is incorrect, please contact OpTech by email at

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Purchase Order #9				
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Email jengen@ightchus.com		33	Shipment Tracking	g O
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steamahead.pay@optechus.com to modify the purchase lines.

5) To create an invoice, slide the scrollbar on the right to the bottom of the screen to select the "Create Invoice" button.

	Merclahor Date: 0182725			Alter Janual Way	-	
	Reporter Janet Report		* Shipr	nent Tracking	0	
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1	page 55 (45) 10 .					
				Course Involue	920.00	
	Comments				and the second second	Contraction of the local division of the loc

- 6) On the Create Invoice screen, you will be prompted to fill in the required fields.
 - a. Invoice# enter the invoice number using the first letter for the semester (W for Winter/Spring, S for Summer, F for Fall), followed by the year (e.g. 2025), followed by the 1 for the pay period
 - i. E.g. W2025 1 for the first pay period of the Winter/Spring 2025 semester.
 - Invoice Date Date entering invoice in Coupa, any other date will not meet the "Net 10" terms
 - c. Currency auto populated by the Coupa system
 - d. You can also provide the following, though it is not required:
 - i. Image scan Attach a copy of the invoice
 - ii. Supplier Note Enter the time period you are requesting for reimbursement.

and a state of the second	ick Submit. You'll be not	voice number. Check the fied if the invoice is appr	tine details, make any nec oved or placed on hold	essary changes an	nd put in any extra charges.	×
General Inf	0		9 From			
* Invoice #	W2025	0	* Supplier	MEDC		
* Invoice Date	01/07/25		Supplier Tax ID	-		
Payment Term		~	*Invoice From Address	MEDC 300 N. Washington Lansing, MI 43913	Square	
Statum	Draft			United States		
Image Scan	Choose File No lie cho	sen	* Remit 3p Address	MEDC 300 N Washington	D	
Supplier Note	01/01/2025 - 01/14/2025			Lansing, MI 40913 United States		
Atachments	Add File USL Text		* Ship From Address	MEDC 300 N. Washington Lansing, MI 40913 United States	D Square	
			9 To			
			Customer	Op Tech US		
			Duyer Tax ID	910029345 🛥		
Lines					C Line Level Ta	natio
Lines			Dayer Tan D	910029345 ¥	C Line Level T	
Type Descri	ption Qty	NOU	Price		1 920 00	

- 7) Scroll down to view the Lines section of the invoice.
 - a. Note the following:
 - i. Quantity total # of hours the intern is authorized for throughout the semester (e.g. 400, etc.) This field is **pre-populated**.
 - Price (the reimbursable hourly wage e.g. if an intern is going to earn \$20.00 an hour, you can receive up to \$10.00 back in the 1:1 wage match, so the price for the intern would read 10.00)
 - iii. Total amount of the line for each intern (the total authorized reimbursement amount for the intern, per semester).

- 1. Note: The Total Amount field is configured to accept a specific number of decimal points. This has resulted in some of the line totals to display as 3,999.50 and should be 4,000.00. OpTtech will adjust any differences after the last invoice is submitted for the semester.
- b. To begin, click on the "QTY" field and type in the # of hours worked during that pay period (e.g if an intern worked 40 hours during the pay period, type 40). Please note, the field is pre-populated with the total remaining # of hours the intern is authorized for the semester. You must delete this pre-populated number and type in the # of hours worked during that pay period.
- c. If there is an intern who did *not* work during a pay period, click the red "X" next to that intern's total.

Ħ	Mickey Mouse	245 I	Each	v	8.00	1,920.00
PO Line 9-1		Service/Time She None	et Line	Contract		Supplier Part Number
Billing 2005-Ce	t of Sales-MEDC					
Type	Description	Oty	UOM	Price		4 000 00
	Donald Duck	400	Each		10.00	4,000.00
PO Line 5-2		Service/Time She None	et Line	Contract		Supplier Part Number

8) Notice when you enter the correct # of hours worked during the pay period, you will see the line amount for the invoice change (in this example, it went from 4000.00 to 400.00).

	Type T	Description Donald Duck	0ry 40	UOM Each	~	Price	10 00		400.00
	PO Line 9-2		Service/Time She None	eet Line	Contra	ce		Supplier	Part Number
	Billing								
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<	Add Line	of Sales-MEDC	bellast.	Ter	tais & Taxes Lines Net 3	, stal			400 00

9) Scroll down and click the "Calculate" button to ensure the invoice total is the correct amount that you wish to submit. Once you confirm the total is correct, click "Submit."



- A notification box will appear, stating that you are going to submit an invoice to OpTech with the total amount of the invoice.
 - a. If the total is incorrect, click
 "Continue Editing" to correct and recalculate the invoice.



- b. If the invoice and the total is correct, click "Send Invoice".
- Once submitted, you will see a list of all invoices (pending, approved, disputed, etc.). The invoice you submitted will be listed as "Pending Approval".
 - a. Once approved, the status will read "Approved".
 - If disputed, the invoice will say "disputed" along with a comment explaining why it was disputed and instructions on how to resolve it.

MEDC INVOICE	W2025 IS	perid									
structions From	n Custome	er .									
kample text - this meaner Inver-	is set on yo	ur Car	npany Information (ићар ра	pe and will	be displayed for CSP and	SAN sup	pliers on the invo	ice list p	ege)	
inconce in the											
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Invoice #	Creator	de .	Status	10.8	Total	Unanswered Comment	b Dis	pute Reason			Actions
W2025	01/07/2		Pending Approval		400.00	No					
None	01072				5,520.00	No					10
None	01/07/25		Draft	9	5,200.00	No					10
None	01/07/25		Draft	9	5,200.00	No					10
None	01/07/25		Draft	9	5,920.00	No					10
W2025 1	01/07/25		Voided		720.00	No					
5	1107/24		Pending Approval	None	400.00	No.					
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612024-6302024	05/06/24		Voided	None	1,400.00	Yes	Prio	different from P	O'Contra	ect or Catalog	

PART III - VIEW REMAINING GRANT FUNDING IN COUPA PORTAL

To view the remaining balance of grant funding per intern, a new invoice is created, and the balance of the grant funding is available to view.

1) Navigate back to the Purchase Order in the Coupa Portal, and click back on the PO # or click on the Gold Poker Chips.

	D.				Select Customer	OpTech US	
Purcha	ase Ord	ers					
instructions	From Custome	r					
(Coample test	- this is set on yo	Ke Company In	formation setup pag	e and will be displayed for CSP an	d SAN suppliers on the Purchase On	ber list page)	
			Click the	Le Action to Invoice fro	m a Purchase Order		
Frend to	•		Click the	he Action to Invoice fro	m a Purchase Order	✓ Search	9
Present to PO Num	Circler Date	Status A	Click the	Section to Invoice fro	m a Purchase Order	v Search Total Assigned	Actions
Presettas PO Nan	Coder Date 010705	Status A Issued No	Click the cknowledged At	Action to Invoice fro	m a Purchase Order Vew M Unasseered Consents No	Search Total Assigned 5.929.00	Actions In In

2) The screen will display the amount invoiced against the purchase order line (e.g. Showing here that \$400 was invoiced). Click "Create Invoice".

-								
1	Type	Bern	City	Unit	Price	Total		Invoiced
	Ħ	Mickey Mouse	240	Each	8.00	1,920.00		0.00
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2	Type	Bern	City	Unit	Price	Total		Invoiced
	π	Donald Duck	400	Each	10.00	4,000.00		400.00
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	None		None	None	None			
P.0	rpage 15	1 45 1 90						
							,920.00	
						Create Invoice	Seve	Print View

3) The Lines section of the Invoice displays in the Qty field the remaining hours and the Balance displays the total dollars of the grant funding remaining that may be used.

Note: Future invoices will continue to reduce the hours available in the Qty field and the Balance total for each Purchase Order line. If you submit an invoice for more hours than are availabe or the total dollars remaining, you will receive notification there are not enough hours or availabe funds for the invoice. Optech will reject the invoices.

Example: an Intern worked 15 hours and the Purchase Order line displays a quantity total of 3 hours in the QTY field. Only 3 hours may be used for the invoice.

